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ABSTRACT

Constituting the third progress report on the Bureau of Indian Affairs' School Management Option, Management by Objectives Project, this document presents revisions designed to improve the overall quality, increase activity levels, improve the reporting process, and assure high priority for work of the objective. Specifically, this report includes: (1) revision of the basic objective to reflect commitment "to operate under the management system chosen within fiscal year 1975" and strengthening of the tribal governments via initial and continuous consultation; (2) revision of the approach to reflect the importance of tribal/village governments, the long term aspects of the project, and the problem of presentations; (3) monitoring, evaluating, and reporting procedures (revised to: achieve the objective; improve and reflect a higher quality of effort; and provide up-to-date information to be used as feedback; (4) project results (two Alaskan schools have opted to join the public schools and "expected results" have been developed by area offices); (5) special concerns (area directors, communications, and off-reservation boarding schools); (6) guidelines for developing central and area office educational strategies (cost factors; needs assessment; public school involvement; role statements; preparation of personnel). (JC)

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RESEARCH AND EVALUATION REPORT SERIES NO. 29.03

CONTROL OF INDIAN EDUCATION IN BIA SCHOOLS

A PROGRESS REPORT

ON THE

PRESIDENTIAL/SECRETARIAL OBJECTIVE

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MAY 1975

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INTRODUCTION AND GENERAL COMMENTS

This is the third progress report for the Bureau's School Management Option, Management by Objectives (MBO) Project. Several things have happened since the last report which have had significant effects on the activities aimed at achievement of the Objective.

First, the Objective was accepted as a "Presidential Objective." This adds importance, priority, and status to the work as it relates to other activities in the Bureau's Education Program.

Second, a basic review of the Bureau work regarding the Objective was held in Washington on October 31 and November 1. This review and critique session was attended by representatives of the Central Office Education, Commissioner's staff, Department of Interior and the Office of Management and Budget. It was pointed out at this meeting that there was a need to take a fresh look at the Project and to place additional emphasis on it in order to:

Improve overall quality

Increase activity levels

Improve the reporting process

Insure that the work of the Objective has a high priority

A new approach was taken regarding the planning of the entire Project. The new approach emphasizes local Area Office plans and uses them as a point of departure for developing Bureauwide plans. A special meeting of BIA CHief Education Officers was called in Washington on November 6 and 7 to revise Area Office plans. The work of this conference will become the foundation of a Bureauwide effort.

In effect, this report is a summary of several rather intensive efforts and activities to improve and update the MBO pertaining to Indian control of education.

Key activities or points are as follows:

- Tribal governments are to be consulted first and continuously regarding participation and/or involvement in consideration of School Management Options.

- The Commissioner signed a memo to Area Directors on November 4, 1974, placing special importance and emphasis on achievement of the Objective.

- BIA Chief Education Officers from Area Offices met in Washington on November 6 and 7 to review and revise Operating Plans.

- The approach to re-planning and revising activities was to start with Area Office plans and from them, develop a Bureauwide Operating Plan. Revised plans for seven Area Offices were developed.

- Two booths were developed for showing the Objective. The booths were at the conventions of the National Congress of American Indians and the American Indian Education Association.

- The monitoring process was revised and now reflects more and different types of relationships between Central Office, Areas, Agencies, schools, and tribal governments. It was decided that an outside monitor-evaluator would be used.

- The needs assessment part of the process was revised so that it is more appropriate and takes less time.

- Closer working relationships are emerging and there appears to be broader understanding as well as improved dissemination of information. The Coalition of Indian Controlled School Boards as well as several tribal groups have made requests for information. Information mailouts regarding the Objective are increasing.

- Filmstrips and accompanying audio developed for communication purposes are completed and are being made available to Area Offices and to tribes.

- The monitoring process is in effect a communication network that covers all BIA Federal school operations. Efficiency and effectiveness of this part of the process is improving rapidly.

- The basic objective has been revised to reflect changes and improvements.

- Two schools in Alaska have already made a decision to join the public school system.

- A special category, "Expected Results" was developed by each Area Office. First estimates indicate that 12 schools would be expected to decide to exercise an option other than a Federal school.

REVISION OF THE BASIC OBJECTIVE

Two major changes in the basic objective have been suggested. These two changes are:

1. Revise the language which makes a commitment to "operate under" the management system chosen within FY 1975.

   Comment: It is unlikely that a change in the management system being used could be accomplished during FY 1975. The revised objective for FY 1975 would be limited to an official selection of the management system.

2. Provide for the strengthening of tribal governments through language which requires that they be consulted first and continuously.

   When the objective was first planned, the role of the tribal or village governments was important but not basic or key to the project.

   Additional language in the Approach would state that the objective will continue beyond FY 1975.

REVISED OBJECTIVE:

By the end of FY 1975, in at least one-fourth (50) of the Bureau Schools, by official action of a Tribal or Alaskan Village Government, a choice of the Management System will be made by those served by the schools.

The "Approach" part of the objective statement also needed some revisions, some of which are directly related to the above discussion, some to reflect modification due to operational problems, and one because of new information and decisions.

First, it is thought that the Approach should also include language addressed to the increased importance of Tribal and/or Village governing bodies. Two changes are made in the Approach to reflect this aspect of the Project.

Second, it was decided that the Project should continue beyond the current 1975 FY and provide a base for Self-Determination and Indian control of education. This, too, is reflected in the changes in the Approach.

Third, the Objective also deals with the activity of making "presentations" of the objective to tribal groups.

Experience thus far has shown that the commitment to make 100 presentations was unrealistic. One-nundred presentations will be made during the fiscal year but they have and will continue to be made under a variety of circumstances. It is suggested that the language contained within the brackets be dropped.

In accordance with schedules to be developed by Area Offices by June 15, 1974, Area Offices will make (a total of 100) presentations during FY 1975 to tribal groups, and through the tribe, local communities and school boards as a means of preparing one-fourth (50) of the Bureau schools to undertake a comprehensive needs assessment leading to greater participation in program planning.

Areas would still have to include 50 schools and related schedules. For instance, though there have not been 100 presentations made thus far in the fiscal year, there have been far more than 100 schools involved in those that have been made. To further explain, the Navajo Area Office is contracting this activity to a tribal group who, using the Navajo social structure, will make presentations. The concept of the presentation that was in back of the 100 target was one of a school and a community. The exigencies of the Project are such that there may be several schools and several communities present for a presentation--and there may be only one school and one community present for a presentation. Whatever, the schedule of presentations will describe in adequate detail how it was handled in each Area, which afterall will provide the results necessary to judge adequacy.

The Revised Approach, which follows, has number changes.

#1 Refers to change in importance of Tribal/Village Governments

#2 Refers to long-term aspects of the Project

#3 Refers to the problem of presentations

REVISED APPROACH:

The people served by all schools operated by the Bureau of Indian Affairs, working through official #1 Tribal or Village Governments, will review and determine the Management System for that school, including the various Options and Alternatives available to upgrade, change and innovate Education Programs for Indian children, through a series of meetings of tribal and community representatives and Bureau of Indian Affairs Area and Agency officials. #2 This Project will lay the foundation for a program thrust in Self-Determination or Indian control of education, that will continue beyond the FY 1975. By May 30, 1974, the Office of Indian Education Programs will develop a training package which will be designed to help a school board, staff, students, parents, tribal leaders and others concerned to assess their school's programs and needs and to understand the Management Options which are available for operating that school; i.e.: Continued Bureau operation, public school, contract, etc. During June 1974, Central Office staff will explain the objective and the use of the training materials to each Area Office in which schools are operated. In accordance with schedules to be developed by Area Offices by June 15, 1974, Area Offices will make #3 presentations during FY 1975, first, #1 to tribal groups, and through the tribe, local communities and school boards as a means of preparing one-fourth (50) of the Bureau schools to undertake a comprehensive needs assessment leading to greater participation in program planning. The tribes and/or school boards of each of these 50 schools will be asked to prepare a resolution on their choice of a Management System for the continued operation of the school which is consistent with the local and national interests and regulations.

The Objective Statements that follow are the original one dated April 1974, and the revised one dated November 15, 1974.

UNITED STATES
DEPARTMENT OF THE INTERIOR

OBJECTIVE STATEMENT – PRESIDENTIAL/SECRETARIAL OBJECTIVES
SECRETARIAL INFORMATION SYSTEM

Date	Project Manager	Approval (Asst. Secy.)	Approval (Under Secy.)
April 1974	Director, Office of Indian Education Progs, BIA		

Objective

By the end of F.Y. 1975 at least one-fourth (50) of the Bureau schools will operate under the management system chosen by those served by the school.

Approach

The people served by all schools operated by the Bureau of Indian Affairs will review and determine the management system for that school, including the various options and alternatives available to upgrade, change and innovate education programs for Indian children, through a series of meetings of tribal and community representatives and Bureau of Indian Affairs area and agency officials. By May 30, 1974, the Office of Indian Education Programs will develop a training package which will be designed to help a school board, staff, students, parents, tribal leaders and others concerned to assess their school's programs and needs and to understand the management options which are available for operating that school; ie: Continued Bureau operation, public school, contract, ecc. During June 1974, Central Office staff will explain the objective and the use of the training materials to each Area Office in which schools are operated. In accordance with schedules to be developed by Area Offices by June 15, 1974, Area Offices will make a total of 100 presentations during FY 1975 to tribal groups, and through the tribe, local communities and school boards as a means of preparing one-fourth (50) of the Bureau schools to undertake a comprehensive needs assessment leading to greater participation in program planning. The tribes and/or school boards of each of these 50 schools will be asked to prepare a resolution on their choice of a management system for the continued operation of the school which is consistent with the local and National interests and regulations.

Constraints

In order to accomplish an objective of this magnitude, a high priority will have to be developed for staff at all levels. Other developmental activities will have to assume a lower priority.

UNITED STATES
DEPARTMENT OF THE INTERIOR

OBJECTIVE STATEMENT - PRESIDENTIAL/SECRETARIAL OBJECTIVES
SECRETARIAL INFORMATION SYSTEM

Date	Project Manager	Approval (Asst. Secy.)	Approval (Under Secy.)
11/15/74	Director, Office of Indian Education Progs, BIA		

Objective By the end of FY 1975, in at least one-fourth (50) of the Bureau schools, by official action of a Tribal or Alaskan Village Government, a choice of the Management System will be made by those served by the schools.

Approach The people served by all schools operated by the Bureau of Indian Affairs, working through official Tribal or Village Governments, will review and determine the Management System for that school, including the various Options and alternatives available to upgrade, change and innovate education programs for Indian children, through a series of meetings of tribal and community representatives and BIA Area and Agency officials. This project will lay the foundation for a program thrust in Self-Determination or Indian control of education, that will continue beyond the FY 1975. By May 30, 1974, the Office of Indian Education Programs will develop a training package which will be designed to help a school board staff, students, parents, tribal leaders and others concerned to assess their school's programs and needs and to understand the Management Options which are available for operating that school i.e., continued Bureau operation, public school, contract, etc. During June 1974, Central Office staff will explain the objective and the use of the training materials to each Area Office in which schools are operated. In accordance with schedules to be developed by Area Offices by June 15, 1974. Area Offices will make presentations during FY 1975, first, to tribal groups and through the tribe, local communities and school boards as a means of preparing one-fourth (50) of the Bureau schools to undertake a comprehensive needs assessment leading to greater participation in program planning. The tribes and/or school boards of each of these 50 schools will be asked to prepare a resolution on their choice of a Management System for the continued operation of the school which is consistent with the local and national interests and regulations.

Constraints

In order to accomplish an objective of this magnitude, a high priority will have to be developed for staff at all levels. Other developmental activities will have to assume a lower priority.

UNITED STATES
DEPARTMENT OF THE INTERIOR

OPERATING PLAN – PRESIDENTIAL/SECRETARIAL OBJECTIVES
SECRETARIAL INFORMATION SYSTEM

Objective:
By the end of FY 1975, in at least one-fourth (50) of the Bureau schools, by official action of a Tribal or Alaskan Village Governme[illegible], a choice of the Management System will be made by those served by the schools.

Project Manager	Title	Org.	DATE OF PLAN	REVISED (date)
Dr. Clennon E. Rockey	*Director, Office of Indian Education Programs*		*07/01/74*	*11/08/74*

LEAD PERSON	MAJOR TASKS	PLN. VS. ACT.	TIME FRAME START	TIME FRAME END	RSRCS.	KEY ACTIONS OR DECISIONS	BY	DATES PLN.	DATES ACT
Hopkins and Waddell	*1. Develop overall strategy (Including monitoring and evaluation)*	P	*4/5/74*	*11/15/74*		*Approved by Commissioner and Department.*	*Commissioner*	*12/1/74*	
		A	*4/15/74*						
Hopkins	*2. Design and develop training package*	P	*4/20/74*	*11/15/74*					
		A	*4/20/74*	*11/15/74*					
Benham	*3. Preparation of Area Offices for use of training package*	P	*6/11/74*	*11/15/74*		*Meet with Assistant Area Directors for Education. Exchange of Area personnel*			
		A	*6/11/74*	*11/15/74*					
Area Directors	*4. Develop detailed Area strategies and operating plans*	P	*7/1/74*	*11/1/74*		*Area Offices plans including specified criteria reviewed by Central Office.*	*Project Manager Commissioner*		
		A	*7/1/74*	*11/15/74*					
Area Directors	*5. Develop tribal and/or community level strategy*	P	*8/1/74*	*12/1/74*		*Schedule of activities and presentations.*	*Area Directors*		
		A	*8/1/74*						
Area Directors	*6. Make presentations to tribal governments, school boards, communities*	P	*7/15/74*	*2/1/74*		*Identify participating schools*	*Area Director*	*11/15/74*	
		A	*7/15/74*						

OPS NO. 8

13

UNITED STATES
DEPARTMENT OF THE INTERIOR

OPERATING PLAN – PRESIDENTIAL/SECRETARIAL OBJECTIVES
SECRETARIAL INFORMATION SYSTEM

Objective:

Project Manager	Title	Org.	DATE OF PLAN		REVISED (date)	

LEAD PERSON	MAJOR TASKS	PLN. VS. ACT.	TIME FRAME START	TIME FRAME END	RSRCS.	KEY ACTIONS OR DECISIONS	BY	DATES PLN.	DATES ACT
Area Director	7. Needs assessment strategies	P	10/1/74	5/1/74					
		A	10/1/74						
Tribal Government	8. Tribal resolutions expressing informed selection of option	P	10/1/74	6/30/74		Tribal decision and documentation of official action	Area Directors	5/1/74	
		A	10/1/74						
Area Director	9. Execution of options	P	5/1/75	-o-		Detailed plans by Area Offices	Area Directors		
		A							
		P							
		A							
		P							
		A							
		P							
		A							

GPS NO. 8

MONITORING, EVALUATING, AND REPORTING

The process of monitoring, evaluating, and reporting for the project was reviewed and discussed at the Washington meeting of Chief Education Officers. What follows reflects the new proposed system for monitoring, evaluating, and reporting for the School Management Options (MBO).

The purpose of monitoring and evaluating activities is to show progress and results. Revisions were made in order to show how and where more effort should be made: Achieve the objective; improve and reflect a higher quality of effort; and provide up-to-date information that can be used as feedback regarding the project. The following reflects what was thought to be the best approach to this aspect of the project.

(1) There will be weekly reporting of progress via telephone to show:

a. What happened during the week, how did it go?

b. What is planned for next week?

c. Special concerns or problems.

Telephone reports to be made to the Indian Education Resources Center, 505/766-3314.

(2) There will be monthly written reports which verify the telephone reports and added material that cannot be transmitted via telephone. Written reports should include official actions of tribes as related to the decisions they make regarding the project.

(3) A monthly meeting of Area Project Managers (or designated representatives) with Central Office Personnel. The purpose of this meeting would be to reinforce the constant and frequent relationships necessary to success of the project.

(4) A Bureauwide monthly report, which is a summary of the Area reporting.

(5) A possible outside contract with a private firm for purposes of monitoring and evaluating the project. This would provide an outside assessment of progress, effectiveness and problems.

(6) Visits for monitoring and evaluation purposes will be made to Area Offices and to schools to provide qualitative information regarding progress and results.

AUDIT-MONITORING PROCESS

SPECIFICATIONS FOR OUTSIDE, NON-GOVERNMENTAL MONITORING AND EVALUATION

Progress thus far in implementing the Management by Objective approach in the BIA's Education Program regarding the control of schools indicates that additional procedures would be helpful. The additional procedures refer to the auditing and/or monitoring of BIA activities. It is proposed that an audit/monitoring process be conducted under contract with a non-Government firm, individual, university, etc.

The purpose of the contract would be to establish an outside monitoring of a government activity in order to provide objective information that would improve the effectiveness of the BIA in carrying out the project concerning Indian control of BIA schools.

The contractor would provide the following:

- *A review of the overall planning and strategy of the project*
- *An audit of activities to determine the extent to which planned activities are actually followed*
- *A review of the planning and strategy of Area Offices*
- *An audit of Area Office activities to determine extent to which plans are being carried out*
- *Provide an assessment of effectiveness regarding the Indian side of the objective. This would show:*
  - *How well communications to Indians were conducted*
  - *Extent of tribal participation*
  - *Identification of problems*
  - *Provide an overall assessment of effectiveness at all levels of operation which would become feedback for project modification.*

The contract would run for the 1975 Fiscal Year and would in effect track BIA activities throughout the year at all levels of operation. It would be helpful if an Indian Management Consultant firm could perform the work. However, if this is not possible, Indians could be employed to conduct the Indian aspect of the contract. It is thought that outside assessment and/or monitoring of the BIA would be helpful to the achievement of the objective. Such a contract is highly recommended by BIA educational staff involved in implementation.

RESULTS

Two schools have already made formal decisions for joining the public school system of the State of Alaska. These are Wainwright and Barrow, both of the North Slope Borough of the State of Alaska. The documentation provided for this purpose (developed earlier in the program) was used and has been submitted to the Central Office. Hence, two communities have opted to join the public schools for the 1975-76 School Year.

A new category of information called "Expected Results" was developed at the recent planning conference involving Area Office Education Officers. A chart, which follows, reflects current Area Office opinions of what can be expected.

EXPECTED RESULTS

AREA OFFICE	OPTION						COMMENTS
	Tribal Contract	Public School	Combination	Federal	Other	Total	
Aberdeen	2		3			5	
Albuquerque	1		1	1		3	
Anadarko				5		5	
Eastern				2		2	
Juneau		2				2	
Muskogee				5		5	
Navajo	3					3	
Phoenix							*No Operating Plan*
Portland							*No Operating Plan*
Total	6	2	4	13		25	

Note: *This information will be updated in the next report to incorporate all designated participant schools. It is presented here primarily to illustrate the format to be used.*

SPECIAL CONCERNS

There have been revisions in the Objective which have slowed progress, but in the long run should prove beneficial. See section, "Revision of the Basic Objective," for details.

The straight forward statement that this would become a program extending beyond the 1975 FY was helpful. Had this been known from the beginning it could have become a basic part of the Objective at an earlier stage. However, it was not too late for this addition to the Project and in the end, it will strengthen it.

Likewise, the Project was not at first planned as a major thrust to assist in strengthening tribal governments. Tribal governments were included in the Project and action by them was necessary. They were to have been involved and the final decision to select an Option was to have been documented by formal, legal action by a recognized tribal government. However, inclusion of strengthening tribal governments as a sub-objective has been done and, like the long-term aspect discussed above, will serve to add importance and strength to the Project.

One Area Office, Portland, has not developed an operating plan. Portland opted not to participate during the earlier phases of the project. However, with the basic changes mentioned above, the project was extended to them under new circumstances. As of now, Area Directors, Assistant Area Directors for Education, and Agency Superintendents cannot speak for Tribes. If a Tribe elects not to participate, then this should be reflected in an official Tribal action, or at least an open and concerned attempt to obtain one.

More communications are needed between the Commissioner and the Area Directors pertaining to the Project. A better and clearer understanding of the importance of the work needs to be achieved. The November 4 memo has been written and disseminated and this was basic and helpful. It is suggested that the program be explained at a meeting of Area Directors. Improved communications have started and need to be continued.

The new role for tribal governments in the Objective means that off-reservation boarding schools (ORBS) will have to be handled as special cases. Each Area Office that includes ORBS in the objective are developing special approaches to the tribal government principle.

PLANNING GUIDELINES

PRESIDENTIAL OBJECTIVES ON SCHOOL MANAGEMENT OPTIONS

Guidelines for Revising and/or Developing Central and Area Office Education Strategies/Plans

1. Purpose: Recently, the Secretarial Objective pertaining to school management options was adopted as a "Presidential Objective." The meaning of this is that the achievement of the objective is of the highest priority in the Bureau's Education program. The Commissioner's memo to this effect is enclosed.

   Progress thus far on achieving the objective indicates that additional planning is required. Better planning and increased activities are needed. More general effort needs to be demonstrated. Everyone needs to elevate the work to top priority.

2. Existing Plans and Activities: Existing work should be maintained. There is no need to curtail current efforts. There is a need to add more and revise some.

3. Planning: More comprehensive planning at all levels needs to be done. The approach to planning will focus on Area Offices first. Central Office (Bureauwide) plans and revisions will emanate and follow Area planning. (Note Dr. Sockey's memo of October 31 to Commissioner.)

   The revised plans should reflect a general increase in overall effort. They should also reflect a closer relationship between all administrative levels of the Bureau's Education program. In order to achieve the objectives there will have to be continuous and frequent contacts between Central Office and Areas; Areas and Agencies and schools.

4. Long Term Possibilities: Careful and comprehensive planning coupled with vigorous and efficient execution will serve to provide a sound base for what will probably become a viable long-term program. This strong possibility should be kept in mind as the planning and follow through take place.

5. Relationships Between Levels of BIA Education: It has been mentioned above that closer and more frequent contacts between all levels of BIA Education will be needed in order to achieve the objective. There will be more formal contacts. There will be more informal contacts. All should strive to achieve the maximum in efficiency, mutual support and teamwork.

6. Tribal Governments: The role of officially recognized Tribal Governments is important to the objective. Recent and on-going work regarding Self-Determination places Tribal Governments in a key position when it comes to Indians taking over control of Indian Affairs. From the very beginning, each Area and Agency should plan to relate the School Management Option to Tribal Governments.

Placing Tribal Governments in a key role may mean that a review of the role of advisory school boards will be required. Revised plans should show decisions to be made by officially recognized Tribal Governments. Each decision point in the process will involve Tribal Governments. These will have to be formalized. Obviously, a close relationship will have to exist between officials of Tribal Governments and BIA personnel carrying out the objective.

New approaches to tribes should be sought and developed. For instance, the efficacy of a tribe assuming control of several schools should be pointed out. New approaches should be shared between Areas.

7. Presentations: Thus far in the project the concept of a presentation has been difficult to define in a precise manner. The second report (Research & Evaluation Report Series No. 29.02) attempted to do this. This definition should be reviewed in relationship to the Tribal Government guideline discussed above in #6. In any event, there needs to be additional checkpoints involving tribes and presentations. For convenience, the definition from Report 29.02 is as follows:

> "A 'Presentation' will be defined, for monitoring purposes, as any meeting or series of meetings between the Area Project Manager for the Presidential/Secretarial Objective (and/or designated and trained Agency staff) and any individuals and groups representative of the Indian population served by a specific BIA operated school."

It is important to point out that Areas may develop their own strategies and methods for making presentations to tribes. The Central Office has developed a set of film strips and audio tapes which may be used. There are also printed materials that will be available very soon from the Central Office IERC. As an alternate approach, the Navajo Area has contracted to a local Indian group to take care of this part of their program.

The schedule of presentations will continue to be an important part of the program.

The objective calls for 100 presentations to 100 tribal groups reflecting 100 BIA schools. Thus far, we are far short of meeting this part of the objective. More effort needs to be made.

8. Community: The definition of the community in relationship to the school and tribe is very important. Consideration should be given to the requirement of a referendum coincident to the decision regarding management options. However, the definition of the community (or what constitutes the community) is extremely important to the tribal decision-making process.

9. Preparation of Education Personnel at all levels: There have been several activities devoted to preparing personnel that have already occurred. This refers to the development of:

a. Basic background material.
b. A set of filmstrips and audio tapes reflecting the program.
c. A tryout of materials with Area. tribes and Central Office personnel present.
d. Two sessions at chief BIA Education offices Conferences.

Other suggestions to improve this key aspect of the program have been made. Two suggestions that have merit are:

a. Area personnel observe an actual presentation before giving one on their own.
b. A special workshop of Area Managers to develop understandings and skills.

Renewed and revised effort is needed.

10. Expected Results: Revised planning efforts should contain expected results. Expected results addresses the questions:

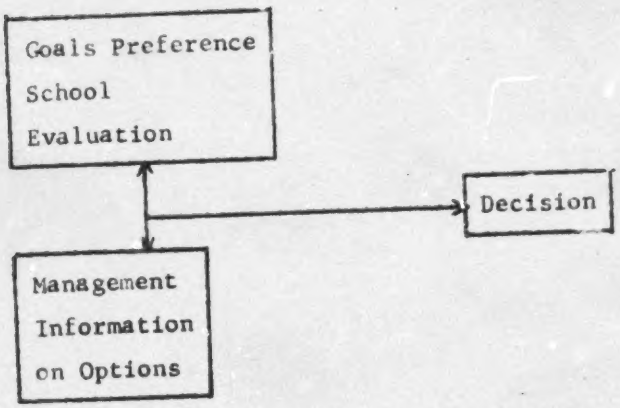
How many presentations can we expect to make?
How many tribal decisions might be expected for:
a. Public school
b. Tribal/Private control
c. Federal school
d. Combination
e. Other

11. Role Statements: Each BIA official involved in the project will have certain duties to perform. Role Statements will be developed which are designed to clarify duties and enhance efficiency. Some possible roles to be developed would be:

Project Manager
Project Coordinator
Project Monitor and Evaluator
Area Project Manager
Agency Project Manager
School Project Manager

12. Cost Factors: Efforts will be made to attach a cost factor to the project.

13. Needs Assessment: Revision of the needs assessment part of the project will be made. The needs assessment model for the project was/is as follows:



Suggested revisions would place the two basic activities of the assessment in a different time relationship. First, the Goal Preference-School Evaluation would be performed very early in the project. It has been suggested that the school evaluation activity be dropped altogether.

Second, the Management Information on options would assume greater and basic importance. In fact, it has been suggested that the first part (goals & evaluation) could be dropped altogether, retaining the management information, only. The overall concept of the management information is presented on page 11 of Report 29.02.

The needs assessment part is yet another aspect that could be developed via contract to the tribe or to technical consultants in educational evaluation and research.

14. Monitoring and Evaluation: Following the revision of Area and Central Office plans, the overall project monitoring and evaluation process will be revised. The revision will include:

More qualitative information on entire project at all levels.
Identification in more detail of results.
Information on tribes.
More detailed information on presentations and training.
More meetings, informal and formal.

It is planned that a contract will be let for purposes of providing an outside evaluation and monitoring to the project on a bureauwide basis.

15. Contract Officer Involvement: Responsibility for contracts pertaining to carrying out the project within an area or in tribal decisions involving an option are those of the Area. Early involvement of BIA contract personnel is advised.

16. Public School Involvement: Like contract officers, involvement of public school officials is an Area responsibility. This too should be made by Areas early in the project.

17. Objective Revision: It is possible that some revision will be made in the wording of the objective. This, however, should not affect Area plans and activities in any significant manner. Any changes made in the basic objective statement will be communicated immediately to Area Offices.

United States Department of the Interior

BUREAU OF INDIAN AFFAIRS
WASHINGTON, D.C. 20242

IN REPLY REFER TO:

31 OCT 1974

Memorandum

To: Commissioner of Indian Affairs

From: Project Manager, Presidential/Secretarial Objective

Subject: Overall Strategy for Accomplishment of the Objective

Monitoring of progress being made toward attainment of the Presidential/Secretarial Objective has revealed the need for greater specificity and detail in strategies and operating plans. It is felt that the priority of the objective calls for a major commitment by all Area Directors, including whatever resources and/or staff may be necessary to get the job done.

Greater specificity and detail of Area Office strategies and operating plans require modifications in the strategies and operating plan of the Office of Education Programs to accomplish those tasks. The major steps in the Central Office strategy are as follow:

1. Assistant Area Directors for Education will meet for a workshop in Washington, D. C. with the Central Office Director and his staff.

   a. Meetings will be held in the Central Office on Wednesday and Thursday, November 6 and 7, 1974.

   b. Nine Areas will be represented, each of which includes the location of one or more Federally operated schools. (Aberdeen, Albuquerque, Anadarko, Eastern, Juneau, Muskogee, Navajo, Phoenix, Portland)

   c. Required criteria for the strategies and operating plans of each Area will be presented in a workshop format by the Project Director and his staff.

   d. Detailed strategies and modified operating plans will be developed by each Assistant Area Director with the assistance of the Project Director and his staff. An acceptable first draft of all strategies and plans will be prepared prior to adjournment of the workshop.

2. The Project Director will identify communications needed from the Commissioner to Area Offices to properly emphasize the importance of the Objective. This will be accomplished on or before November 15, and will include appropriate memos for the Commissioner's signature.

3. The Project Director will specify additional assistance needed in order to implement the objective. This will be accomplished by November 15.

4. The Project Director will develop a more rigorous monitoring system through which to assess or audit individual Area progress based on the approved modified strategies and operating plans. This system will be presented for the Commissioner's approval on or before November 15, and will specifically include measures of quality as well as quantity. It is understood that much of the monitoring activity may be accomplished via contract with non-Governmental organizations. It is further understood that the monitoring or audit system will include assessment of the role and activities of the Project Director and his staff.

5. The Project Director will prepare a paper for the Commissioner on or before November 15, the purpose of which will be a recommended clarification of expected results, and a restatement of the objective toward emphasizing the intent of the Government to continue assistance to Indian people in selection of school management options beyond the specified F.Y. 1975 term for this objective.

6. A set of operating guidelines will be prepared by the Project Director and his staff by November 15 in which the a) roles of BIA Education employees at each level will be specified; b) a comprehensive definition of "Community" as well as "tribal group" will be provided, and c) the key role of tribal governing bodies is emphasized for reaching decisions on School management options.

It is recognized that a close working relationship must be maintained between Area Offices and the Central Office if the Objective is to be achieved. This relationship will include, tentatively, monthly meetings between project staff of both levels to review progress as well as rigorous adherence to strategies and plans as established.

Emmett E. Hardy

United States Department of the Interior

BUREAU OF INDIAN AFFAIRS
WASHINGTON, D.C. 20242

IN REPLY REFER TO:

NOV 4 1974

Memorandum

To: All Area Directors

From: Commissioner of Indian Affairs

Subject: Management by Objectives: School Management Option

Recently, the above mentioned objective was elevated from a "Secretarial Objective" to a "Presidential Objective." This means that the results to be produced by meeting the objective are of highest priority in the Department of the Interior and in the Bureau of Indian Affairs.

For your convenience, a copy of the objective statement is enclosed.

I have designated Dr. Clennon E. Sockey, Director of Education as Project Manager for the objective. In this capacity, Dr. Sockey has been working with your Education Officers regarding the project and will continue to do so. What is needed at this point is a strengthening of the teamwork between all levels of operation in order to achieve the objective. I am asking that each of you make a special effort to support the Education objective and to work with Central Office, Agency and school personnel to achieve a maximum support.

A key principle of the work regarding the option pertains to contracts with tribal governing bodies. You should understand that the objective requires participation and official decisions of tribal governments. The support that you and your Agency Superintendents provide is, in my view, a key factor.

With the high priority that the objective has with the Department and with the Bureau, major revisions and renewed efforts are being made. During the week of November 4-8, Assistant Area Directors for Education will be meeting with me and Dr. Sockey in Washington to review and to make necessary revisions of the work that has been planned and carried out thus far. Following this meeting, a more detailed project will be developed, which will include a revised monitoring and evaluation process. It is anticipated that a contract will be let to an outside agency to monitor Bureauwide progress on the objective. I encourage you to cooperate fully with the internal monitoring that will be conducted by Bureau employees and with the non-government monitoring and evaluation that will be conducted by contract personnel.

Basic to the achievement of the objective is the involvement of tribal groups in the decisionmaking process regarding the control of what are now Federal schools. All plans and efforts will be aimed at providing a structured approach to deciding the control of schools by tribal groups. I ask that you take a personal interest and part in the plans of your Area and support them in whatever manner possible so the Bureau can in the end show what work was conducted and by whom and, most important, the RESULTS achieved by strong cooperative teamwork at all levels of operations.

Morris Thompson

Enclosure

PRESIDENTIAL/SECRETARIAL OBJECTIVE

Bureau of Indian Affairs
Office of Education Programs

"By the end of Fiscal Year 1975, at least one-fourth (50) of the Bureau Schools will operate under the Management System chosen by those served by the school."

APPENDIX C

CONFERENCE ON THE PRESIDENTIAL OBJECTIVE ON INDIAN CONTROL OF FEDERAL SCHOOLS, SCHOOL MANAGEMENT OPTIONS
Washington, D.C.
November 6 & 7, 1974
Interior South, Conference Room, 2nd Floor

Wednesday, November 6

8:30	Opening Remarks Morris Thompson, Commissioner of Indian Affairs
9:00	Status Report on the Presidential Objective Dr. Clennon E. Sockey, Director of Indian Education Programs
9:30	The Bureau's Management by Objectives Program Mr. James Robey, Assistant to the Commissioner
10:00	BREAK
10:20	Planning Guidelines for the Conference Mr. Jerry Waddell, Conference Chairman Dr. Thomas R. Hopkins, Project Monitor Dr. Paul R. Streiff, Project Monitor
11:30 - 1:00	LUNCH
1:00	Continue Discussion of Guidelines
2:00	Revise Area Office Plans (Work Sessions)
4:30	Dismiss for the Day

Thursday, November 7

8:30	Continue Area Office Planning
9:30	Review and Finalize Area Strategies and Operating Plans
10:30	Revision of Bureauwide Plan and Strategy
11:30 - 1:00	LUNCH
1:00	Continue Revision of Bureauwide Plans and Strategies
3:00	Concluding Remarks Dr. Clennon E. Sockey, Director of Indian Education Programs